Informal Planning Policy Guidance: Foodstore Provision in North West Cambridge

OPTIONS REPORT

September 2010

Cambridge City Council & South Cambridgeshire District Council

Contents

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Options Report

EXECUTIVE SUMMARY

i Large scale development is proposed in the North West (NW) quadrant of Cambridge at the University Site (covered by the North West Area Action Plan (NW AAP, 2009)), NIAB sites and Orchard Park. This will result in an additional 7,000 dwellings and 2,000 student units by 2021. Since the Cambridge Sub-Regional Retail Study was completed in October 2008, there have been a number of changes to the level of housing development proposed in the NW of Cambridge. The amount of housing now proposed is nearly 2,000 greater than was originally envisaged when the Councils were preparing the formal planning policy documents. In addition, proposals for larger scale foodstore provision have emerged from discussions with the developers of the three sites.

ii The sites in NW Cambridge fall within both Cambridge City Council and South Cambridgeshire District Council (SCDC) and both Councils considered that they needed to jointly investigate the food retailing needs of this part of Cambridge further to ensure that both new and existing residents have adequate food retailing facilities available. This is important in developing sustainable communities which have their own appropriate level of food retail provision and when considering the potential to reduce the need to travel elsewhere in the City or beyond for main food shopping, thus establishing sustainable transport patterns. This work was supplemented by transport work involving input from Cambridgeshire County Council, and other planning and design related work, as these are also important considerations in the selection of the appropriate size and location for any further food retail provision.

iii The aim is to produce joint informal planning policy guidance (IPPG) on foodstore provision in NW Cambridge in order to provide an up to date supplement to retail policies in existing plans and help to guide the future planning of the three sites. The first step in developing the Informal Planning Policy Guidance is to prepare an Options Report for public consultation prior to taking a view on the preferred policy approach.

iv To support the development of the IPPG and this Options Report, two independent studies have been commissioned and carried out by consultants. These are a Supplementary Retail Study (SRS) (June 2010) carried out by Nathaniel Lichfield and Partners (NLP) and a Retail Transport Study (June 2010) carried out by Atkins. The Councils have also carried out additional work relating to planning and design matters.

v The existing plans for the area are for a local centre to be provided in each of the three developments (University, NIAB and Orchard Park) with local foodstore provision in each. The SRS shows that the existing planned development would not adequately address the qualitative and consequential quantitative need for convenience retail provision in NW Cambridge to 2021. In addition, the transport study finds that this would have disbenefits for the local residents causing them to travel further for main food shopping.

vi The SRS identifies a need for main foodstore provision in N W Cambridge (ie. where it is possible to carry out main weekly food shopping) and puts forward two appropriate options for how this could be provided as at 2021. These are either a superstore of 2,500 sq m convenience floorspace (which equates to 3,500 sq m net or 5,500 sq m gross) or two supermarkets of around 1,500 sq m convenience floorspace (which equates to 2,000 sq m net or 3,000 gross). For comparison, the superstore would be similar in size to the existing Tesco store at Yarrow Road (Tesco, Fulbourn) or Asda at the Beehive Centre, and the two supermarkets would each be larger than the Sainsbury’s store in the centre of Cambridge and slightly smaller than the Tesco at Milton.

vii The Transport Study assessed both of these options looking at the different possible combinations of location offered by the three different sites. The study concluded that the difference between the options was marginal in all of the six tests carried out. However, the two supermarket option came out slightly better than a single superstore.

viii In relation to location of main foodstore provision, the SRS and the Transport Study conclude that either the University or the NIAB site is likely to offer a better location than Orchard Park.

ix There is no strong conclusion from the SRS and the Transport Study as to which is the best option in terms of size of store i.e. one superstore or two supermarkets. The SRS indicates that the superstore would provide the 'best fit' in terms of meeting qualitative and quantitative need, whereas the Transport Study is slightly in favour of the two supermarkets option. From a design point of view, a supermarket would be easier to integrate into a local centre than a superstore, although this is not impossible provided that good urban design principles are followed.

x The phasing of provision is also a relevant factor and the SRS advises that the provision of either a superstore or two supermarkets should be phased if provision is made ahead of 2021 in order to help enable the delivery of small supermarkets in the other centre(s). If it were a superstore the issue would be the practicality of phasing its provision and the difficulties of making it a sustainable form of construction. If it were two supermarkets there would be a question around which location came forward early and which was held back and the nature of the local centre in which the supermarket is delivered later.

xi The four options that are being put forward for public consultation are as follows:

- Option A – Planned Development Only, i.e. local foodstores in each of the three Local Centres (this is the policy baseline situation, with the committed and pipeline floorspace and no further foodstore provision)

- Option B – Two supermarkets of 2,000 sq m net floorspace (1,500 sq m net convenience), one at the University site and one at NIAB, and the committed floorspace at Orchard Park

- Option C – One superstore of 3,500 sq net floorspace (2,500 sq m net convenience), at the University site, and the committed / pipeline floorspace at NIAB and Orchard Park

- Option D – One superstore of 3,500 sq net floorspace (2,500 sq m net convenience), at the NIAB site, and the committed / pipeline floorspace at the University Site and Orchard Park.

xii The Options Report sets out the advantages and disadvantages of each option, using information from the evidence base. The Councils would like to hear your views on each of the options and your preferred option and reasons for choosing this. Questions are provided which we would like your views on.

xiii. The consultation period will run for a six-week period from Monday 6th September to 5pm on Monday 18th October 2010.

1. INTRODUCTION

1.1 Large scale development is proposed in the North West (NW) quadrant of Cambridge at the University Site (covered by the North West Area Action Plan (NW AAP, 2009)), NIAB sites and Orchard Park. This will result in an additional 7,000 dwellings and 2,000 student units by 2021. This equates to a population of approximately 18,000 people[1]. The NIAB sites and Orchard Park site are predominantly housing developments, whereas the University site will also include student accommodation and employment for approximately 4,000 to 5,000 people. A local centre is proposed in each of the three developments.

1.2 Since the Cambridge Sub-Regional Retail Study was completed in October 2008, there have been a number of changes to the level of housing development proposed in the NW of Cambridge. These changes are as a result of the public examinations of the NW AAP (prepared jointly by Cambridge City Council and South Cambridgeshire District Council) and South Cambridgeshire Site Specific Policies Development Plan Document (DPD) and subsequent binding decisions by the Planning Inspectors, which are now included in adopted plans. Around 2,000 more homes are now proposed than was originally envisaged when the Councils were preparing the formal planning policy documents. In addition, proposals for larger scale foodstore provision have emerged from discussions with the developers of the three sites.

1.3 The sites in NW Cambridge fall within both Cambridge City Council and South Cambridgeshire District Council (SCDC), and both Councils considered that they needed to jointly investigate the food retailing needs of this part of Cambridge further to ensure that both new and existing residents have adequate food retailing facilities available. This is important in developing sustainable communities which have their own appropriate level of food retail provision and when considering the potential to reduce the need to travel elsewhere in the City or beyond for main food shopping, thus establishing sustainable transport patterns. This work was supplemented by transport work involving input from Cambridgeshire County Council, and other planning and design related work, as these are also important considerations in the selection of the appropriate size and location for any further food retail provision.

1.4 The aim is to produce joint informal planning policy guidance (IPPG) on foodstore provision in NW Cambridge in order to provide an up to date supplement to retail policies in existing plans and help to guide the future planning of the three sites.

[1] Using a standard multiplier of 2.3 persons per dwelling and 1 person per student unit.

2. AREA TO BE COVERED BY THE INFORMAL PLANNING POLICY GUIDANCE

2.1 The area to be covered by the IPPG is the NW quadrant of Cambridge, including new development at the following sites. Figure 1 provides a map showing the location of these sites.

1. **The University Site** – land between Madingley Road and Huntingdon Road covered by the NW AAP and owned by Cambridge University. The site falls within both the City Council area and SCDC area, crossing the boundary. This will be a distinctive mixed-use development providing a new University quarter. It will provide approximately 3,000 dwellings with a priority on providing for the housing needs of University and College key workers and approximately 2,000 units of student accommodation. There will also be academic facilities and associated research and development, which are expected to create approximately 4,000 to 5,000 jobs.

2. **The NIAB Sites** – land between Huntingdon Road and Histon Road. This comprises the NIAB 1 site within the City Council area and the NIAB 2 site within SCDC.

   The NIAB 1 site is a new urban extension including housing and community facilities. A current planning application (at June 2010) proposes 1,593 dwellings and a local centre including 1,200 sq m gross convenience floorspace and a primary school. 187 homes already have outline planning permission on the Huntingdon Road frontage, giving a total of 1,780 on the site.

   NIAB 2, which is to the north of the NIAB 1 site was recommended for development by Inspectors following the housing shortfall work carried out by SCDC during the examination of the Site Specific Policies DPD and is allocated in the adopted DPD. This will be a sustainable housing-led urban extension of Cambridge, providing approximately 1,100 dwellings. A secondary school to serve the whole NW quadrant and a primary school will be provided within the development. Retail facilities to serve the development could be provided at the local centre in NIAB 1.

3. **Orchard Park** – a permitted mixed-use development of 900 dwellings with a local centre. The site is entirely within SCDC area. A third of the housing is affordable and over half of the dwellings are now occupied. The Inspectors' Report for the SCDC Site Specific Policies DPD has agreed the change of some of the commercial parcels of land to residential, which would result in an approximate additional 220 dwellings. Reserved matters were approved in August 2009 for shop units in a local centre at Orchard Park adjacent to the A14, totalling 1,523 sq m gross retail

floorspace (958 sq m gross for the core convenience unit). This permission has not yet been implemented.

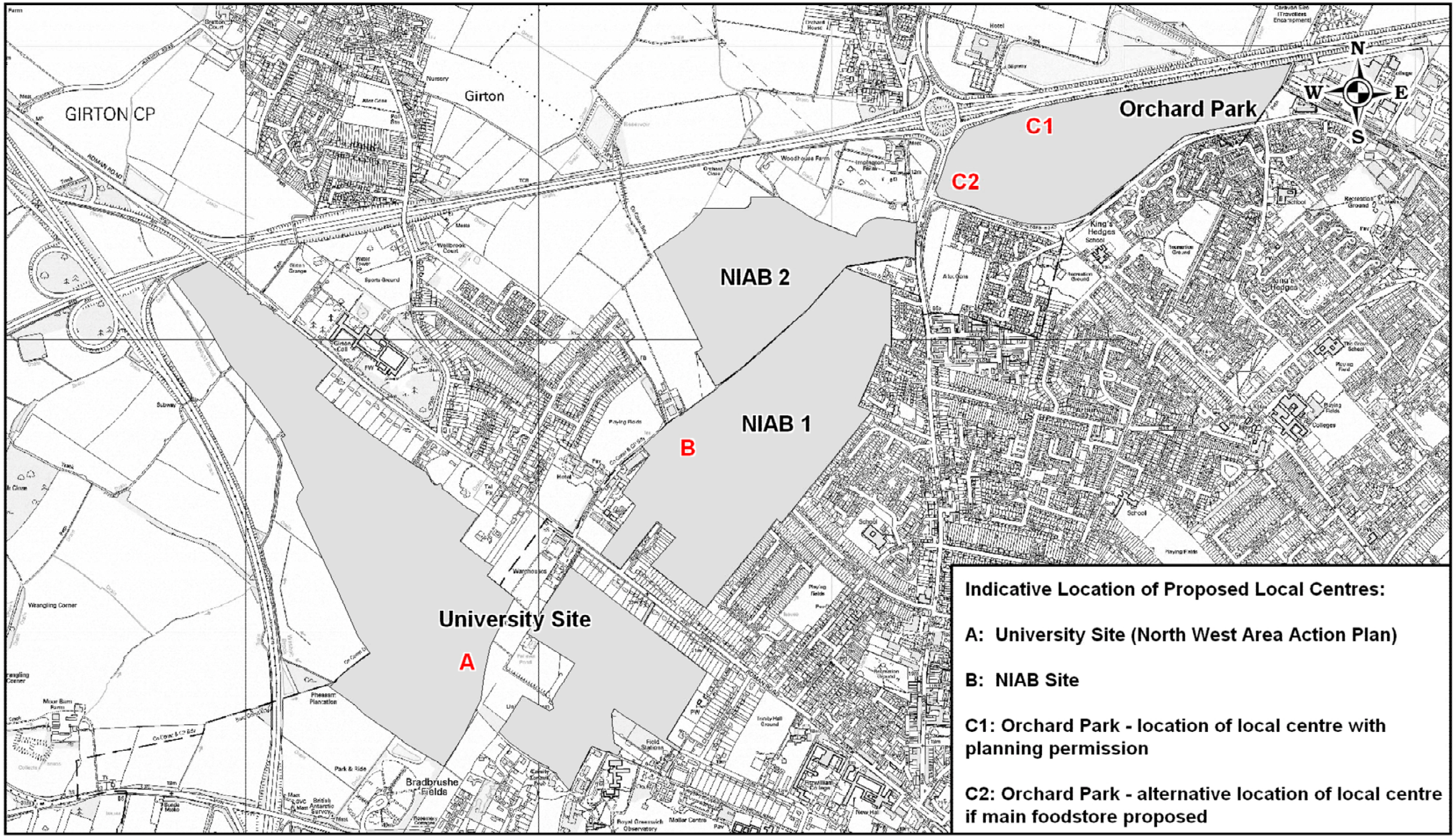

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Figure 1: Location of Development Sites and their Proposed Local Centre, in North West Cambridge

Date:	30/06/2010
Produced by:	Michael Sexton
Service:	Planning Policy
Scale:	1:18,000 @ A4

3. PLANNING POLICY CONTEXT

National

3.1 Planning Policy Statement 4 (PPS4): Planning for Sustainable Economic Growth (2009) sets out national policies in relation to retail development. The focus for retail development is within town, district and local centres. The PPS also aims to deliver more sustainable patterns of development, reduce the need to travel, especially by car and respond to climate change. This Options Report is in line with all these aspects of PPS4 and has also used evidence to plan positively for retail development in line with Policy EC1. The Supplementary Retail Study (SRS) was carried out taking into account the requirements of PPS4 in relation to assessing quantitative and qualitative need and assessing impacts in line with Policy EC16.

Regional

3.2 The new Coalition Government announced the immediate revocation of Regional Spatial Strategies (RSS) on 6th July 2010, and as a result the East of England Plan no longer remains part of the development plan for Cambridge and South Cambridgeshire.

Local

3.3 Existing retail policy is set out in the following plans:

- Cambridge Local Plan (2006) (policies saved in July 2009) - Policy 9/3 (Development in the Urban Extensions) and in relation to the NIAB site Policy 9/8 (Land between Huntingdon Road and Histon Road). Policy 6/8(d) supports convenience shopping in the new urban extensions;
- South Cambridgeshire Local Development Framework – Core Strategy (2007) and Site Specific Policies DPD (2010) – Policies SP/1 in relation to Orchard Park and SP/2 in relation to NIAB 2;
- North West Cambridge Area Action Plan (2009), which covers the University Site. This is a joint Area Action Plan (AAP) prepared by Cambridge City Council and SCDC.

3.4 The principle of a Local Centre at the University Site is established by policy NW21 of the NW AAP. The location of the local centre at the heart of the development will assist in bringing together the two parts of the development and encouraging the creation of a cohesive community either side of the strategic central open space. The AAP anticipates that the local centre will provide for:

- Primary schools, pre-school care;
- An appropriate level of local shopping and services;
- Library, Life long learning centre and information access point;
- Flexible community meeting rooms;
- Provision for emergency services;
- Play Areas for children;

- Healthcare provision;
- Neighbourhood recycling point

3.5 The glossary to the AAP indicates that an appropriate level of shopping and services in a Local Centre would include a small supermarket and other units accommodating uses such as newsagents, post-office, pharmacy, hairdresser and other small local shops.

3.6 The proposed Local Centre at the NIAB 1 site is not set out explicitly in the 'saved' policies of the Cambridge Local Plan. However, Policy 9/8 of the Local Plan which relates to the NIAB 1 site, land between Huntingdon Road and Histon Road, refers to 'complementary mixed uses including 1.5 hectares for a primary school'. In addition Policy 9/3(j) sets out the requirement for the urban extensions to include 'a mix of uses in Classes A1 to A5...catering only for local needs' and Policy 6/8(d) supports convenience shopping as part of the urban extensions. The current outline planning application includes a Local Centre with 1,200 sq m gross convenience floorspace. Policy SP/2 of the South Cambridgeshire Site Specific Policies DPD for the NIAB 2 site requires local shopping facilities and provides for these to be through a larger local centre in the NIAB 1 site if this is found to be the most appropriate location. As neither of these centres has gained planning approval yet they are regarded as pipeline developments.

3.7 Reserved matters were approved in August 2009 for shop units in a local centre at Orchard Park, and this is therefore regarded as a commitment. The planning permission includes 1,523 sq m gross retail floorspace (958 sq m gross for the core convenience unit, 282 sq m gross additional A1 floorspace and 282 sq m gross floorspace in Class A2 to A5 uses).

3.8 The emerging Cambridge City Council Core Strategy (Cambridge Development Strategy: Issues and Options Report, June 2007) sets out a hierarchy of centres at Policy Option 26. This identifies that other than Cambridge East, which would have a large District Centre, all of the other urban extensions would have Local Centres.

3.9 The current adopted planning policy context for North West Cambridge does not provide for a main foodstore of a size and therefore range of goods to enable a full weekly shop. The Local Centres proposed were intended to accommodate small supermarkets catering for local needs. Whilst the size of a small supermarket is not defined in policy, PPS4 states that the upper limit for a supermarket is 2,500 sq m net retail floorspace and a small supermarket would logically be considerably smaller. Given the change in circumstances, the Councils recognise that current policy will not fully address the retail needs in North West Cambridge and that there is need for informal planning policy guidance in order to effectively coordinate retail development within the NW quadrant of Cambridge. Proposals for larger scale foodstore provision have emerged from discussions with the developers of the three sites.

3.10 Therefore it has been necessary to establish the need for future convenience floorspace taking into account the greater level of housing proposed, and to effectively plan for this need by production of IPPG.

Status of the Informal Planning Policy Guidance

3.11 The plan-led system would normally require a revised statutory planning policy to be prepared where a new approach to development is proposed. However, in the context of current developer aspirations and the need to increase the overall supply of market and affordable housing in Cambridge, it is not practicable to follow this route because of the timeframe involved in preparing a DPD. Nor is it possible to prepare a Supplementary Planning Document because there are no statutory policies with which the proposed approach would be entirely consistent and which it could therefore supplement.

3.12 In order to prepare the IPPG, a wide and detailed evidence base has been collected as part of this process and the first step in developing the Informal Planning Policy Guidance is to prepare an Options Report for public consultation prior to taking a view on the preferred policy approach. By taking this approach, the informal planning policy guidance will have as much weight as possible as a material consideration in the determination of any planning applications that may be received and it is also in the spirit of the localism agenda that is being brought forward by the Coalition Government. It also facilitates a consistent approach between the Councils.

3.13 The most appropriate options are presented for consultation, which is consistent with the normal process for preparing planning policy documents in order to provide a full opportunity to consider the merits of the various options for food retailing in the NW of Cambridge. The advantages and disadvantages of each of the proposed options are provided in this report. Following consultation, the preferred option will be used to develop the informal planning policy guidance note.

Strategic Objectives for North West Cambridge

3.14 The existing policy context has been used to draw together a number of strategic objectives for development of North West Cambridge. These include:

1. To deliver sustainable communities with a mix of uses, and appropriate services and facilities to support the new population, whilst also serving existing communities.

2. To secure high quality development in terms of the design of the built and natural environment.

3. To minimise carbon dioxide emissions and to make the best use of energy and other natural resources, by being an exemplar of sustainable living.

4. To secure a wide range of housing types and tenures.

5. To contribute to meeting the long-term development needs of Cambridge University.

6. To maximise walking, cycling and public transport use and to achieve a modal split of no more than 40% of trips to work by car (excluding car passengers).

7. To provide an appropriate landscape setting and high quality edge treatment for Cambridge.

8. To secure the infrastructure needs of the development, including green infrastructure.

9. To protect existing wildlife and wildlife corridors and areas of special geological interest and secure a net increase in biodiversity.

Retail Objectives for North West Cambridge

3.15 In addition to the strategic objectives guiding development in North West Cambridge, a number of specific objectives in relation to retail have been developed which the IPPG will seek to address. These include:

a. To create sustainable communities with an appropriate provision of shopping and services in appropriate locations, to serve the new and existing population, and reduce the need to travel overall, particularly by car.

b. To establish an appropriate hierarchy of centres in the North West of Cambridge.

c. To secure high quality of design in centres, and ensure that they integrate well with the surrounding development.

d. To secure a high degree of sustainable design and construction for retail units in line with BREEAM ‘Excellent’ standards or an equivalent if BREEAM is replaced, in order to make the best use of energy and other natural resources and minimise carbon dioxide emissions.

e. To maximise the opportunities for walking, cycling and public transport use to access the centres by carefully considering the location of each centre.

Question 1: Do you agree with the retail objectives for North West Cambridge? Are there any changes you would like to see and why?

4. EVIDENCE BASE

4.1 To support the development of the IPPG and this Options Report, two independent studies have been commissioned and carried out by consultants. These are:

- North West Cambridge Supplementary Retail Study (SRS) (June 2010) carried out by Nathaniel Lichfield and Partners (NLP). This is a supplement to the Cambridge Sub-Regional Retail Study (October 2008) undertaken by GVA Grimley for the City Council and SCDC as an evidence base for both Councils' Local Development Framework (LDF);
- North West Cambridge Retail Transport Study (June 2010) carried out by Atkins.

4.2 The Councils have also carried out additional work relating to planning and design matters.

4.3 This section provides a summary of the studies supporting this Options Report and an analysis of the information collected. These are substantial technical documents and should be referred to for more information on the methodologies used and the detailed results.

Summary of Retail Terms

4.4 The retail terms used in the SRS and this document are drawn from national guidance in PPS4. Key terms relate to the type of products sold and the size of store. Also see the glossary at the end of this report.

4.5 The different type of goods that are sold in foodstores are defined as either convenience retailing, which is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery, or comparison shopping, which is the provision of items not obtained on a frequent basis including clothing, footwear, household and recreational goods.

4.6 The calculations in the SRS are based upon net convenience floorspace. The consultants have then used a ratio to calculate the amount of comparison goods. The amount of comparison goods varies depending upon the operator and the size of the store, with larger stores tending to have a higher proportion than smaller stores which focus more on the convenience offer.

4.7 The net floorspace is the area within the shop which is accessible to the public. It includes the part of the sales floor where convenience goods and comparison goods are sold, and usually also includes checkouts, the area in front of checkouts, lobbies where goods are displayed (although different retailers vary as to whether they measure these areas), but does not include cafés or customer toilets. The gross floorspace is the total floor area within the retail building, including areas not accessible to the public such as staff rooms, storage areas etc.

4.8 Different sizes of foodstore are described based on their net floorspace. Supermarkets have less than 2,500 sq m, often with car parking. Superstores usually have more than 2,500 sq m net floorspace, with supporting car parking.

Committed and Pipeline Developments

4.9 The SRS refers to committed and pipeline developments at the three sites. Orchard Park is the only site with a planning permission for shop units in a local centre, although the permission has not yet been implemented. The permission includes a core convenience unit of 958 sq m. This convenience floorspace is therefore considered to be committed.

4.10 Convenience floorspace provision at NIAB and the University site is still in the development pipeline, as these sites do not have planning permissions. However, the developments are established in planning policy, as outlined above and therefore assumptions have been made in the SRS as to the amount of convenience floorspace at these sites, referred to as pipeline developments. At NIAB, 1,170 sq m net (1,800 sq m gross) has been assumed, based upon the current outline planning application for NIAB 1 for 1,200 sq m gross and increasing this figure to take into account the additional dwellings at NIAB 2 which is not covered by the application. It is likely that the local centre at NIAB 1 will be increase in size to take into account the additional population at NIAB 2, rather than providing two local centres. At the University site, an assumption of 1,625 sq m net (2,500 sq m gross) was thought to be reasonable, based upon the size of the retail proposed in the NIAB 1 application. The pipeline figures are therefore reasonable assumptions, but there is no planning certainty on the size of the NIAB or University convenience floorspace until such time as these have planning permission.

Summary of North West Cambridge Supplementary Retail Study (SRS), June 2010

4.11 The SRS was undertaken by Nathaniel Lichfield and Partners as a supplement to the Cambridge Sub-Regional Retail Study (2008) produced by GVA Grimley[2]. It focuses only on the NW of Cambridge and convenience goods floorspace and updates the information from the GVA Study to take into account revised housing growth numbers and therefore population projections.

[2] http://www.cambridge.gov.uk/ccm/content/planning-and-building-control/planning-policy/local-development-framework/background-studies.en

4.12 It also considers current expenditure growth rates in order to take into account the effects of the economic recession on future levels of retail spending, and revised information on convenience floorspace commitments and pipeline developments.

4.13 The SRS looks at both the qualitative and quantitative need for further convenience floorspace in NW Cambridge. Please refer to the glossary for a detailed explanation of these terms. A qualitative need for a main foodstore in NW Cambridge is identified in the SRS as this part of the City is poorly served by main foodstores at present. This means that a high proportion of existing residents shop at out-of-centre stores that are in the most accessible locations to NW Cambridge particularly Milton and Bar Hill, causing unsustainable travel patterns. The proposed local centres will help serve the day-to-day needs of the new developments but will not significantly address the outflow of convenience shopping expenditure. The unsustainable patterns of travel to undertake main food shopping would therefore remain.

4.14 The study sets out the need to retain expenditure from the new populations within NW Cambridge and claw-back some of the existing expenditure from residents to out-of-centre stores outside of the primary catchment area.

4.15 The SRS focuses on convenience provision and makes some general assumptions for both net retail floorspace and gross floorspace. The SRS takes a 70:30 food (convenience) to non-food (comparison) split for the superstore (3,500 sq m net). This is based upon an average of the top five main foodstore retailers. For the supermarket sized stores (2,000 sq m net) a 75:25 convenience to comparison split is used, although the proportion of comparison goods does seem to be a little high when compared with other stores in Cambridge (see Appendix 1). It uses a 65:35 net to gross ratio. The actual floorspace figures vary according to the supermarket operator, but indicative figures are based on these ratios for the purpose of the study.

Summary of SRS recommendations

4.16 As part of the SRS, NLP defined a small study area in the NW quadrant for the purpose of the need and capacity assessment. The study area includes the urban extension sites as well as areas of the existing population and is defined in postcode sectors. The primary catchment area (PCA) is the area within which the proposed new local centres will meet food shopping needs. The secondary catchment area (SCA) is more extensive and covers areas that the new centres in NW Cambridge may have impact upon. Map 2 from the SRS, provided below as Figure 2, shows the extent of the PCA and SCA and also the location and size of other foodstores.

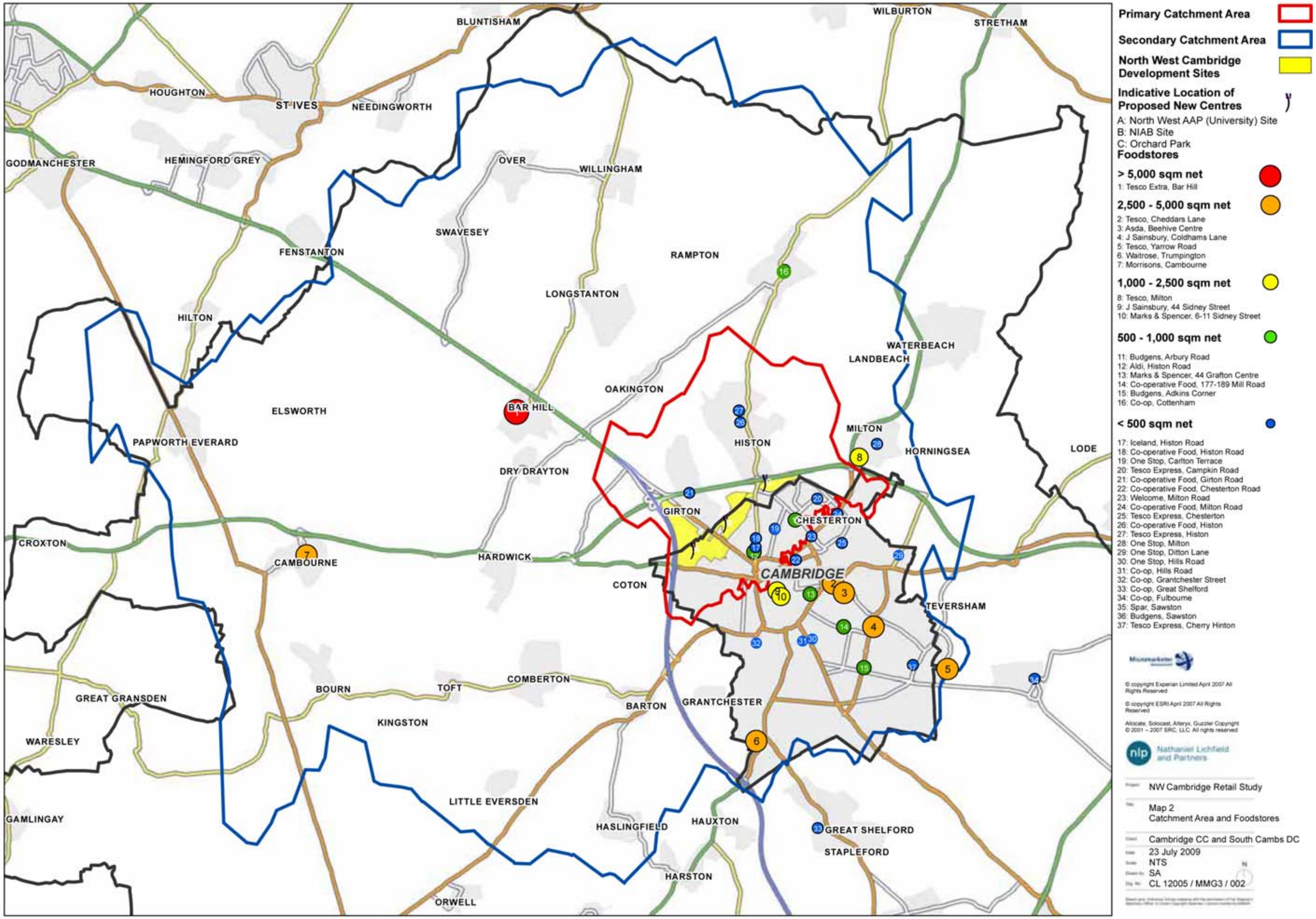


Figure 2: Map from SRS showing Primary and Secondary Catchment Areas and Existing Foodstores

4.17 Based on data from the GVA study there is currently capacity for floorspace to be provided even without the new population created by the urban extensions. The existing population in the PCA generates capacity for 3,000 sq m net of convenience floorspace in 2011.

4.18 The SRS shows that at present only 16% of all convenience expenditure is retained within the PCA and 5% from the SCA, these figures are combined data of main and top-up trips. At present, the study area has considerable convenience trade leakage to the large out of centre main stores; Tesco stores at Bar Hill (4,031 sq m net convenience) and Milton (2,244 sq m net convenience) are the main draws and are the most accessible for the existing population.

4.19 There are no existing stores for main food shopping in the North and West of Cambridge, which explains the low levels of retained convenience expenditure from within the PCA. The area does benefit from some moderate sized discount stores (Aldi, Budgens and Iceland), which are within established Local Centres and are overtrading (trading at a capacity above the estimated benchmark turnover) at present. The overtrading of these stores at present and the likely uplift from the new extensions will mean that these established retailers in centres will not become unviable if provision for main food shopping is made within the area. Operators such as Aldi, Co-op, Budgens and Iceland rely on the discount offer and mainly cater for top-up visits, thus fulfilling a different function to that of the main food retailers.

4.20 A qualitative need for main foodstore provision in NW Cambridge has been identified by the SRS. The addition of large format foodstore provision in NW Cambridge will significantly reduce leakage of expenditure from the PCA, provide consumer choice and reduce the need to travel. It is noted that none of the pipeline convenience floorspace levels for the centres 1,625 sq m net University, 1,170 sq m net NIAB and 958 sq m net Orchard Park would provide a large enough store to meet the main food shopping needs of the existing and future residents of the PCA. Larger format stores than the pipeline levels would also assist in firstly retaining expenditure within the PCA and also in clawing back expenditure from the existing residents within the PCA who travel to shop at destinations further away and mainly accessible only by private car. Therefore a larger retail store than the pipeline figures make capacity for will reduce the need (and/or the distance) for car travel and would be more sustainable.

4.21 The population of the PCA is forecasted to grow from 44,000 at 2008 to 63,750 by 2021, with the completion of the three growth sites exacerbating the identified problems of a lack of main foodstore provision. As detailed in paragraph 4.19 the existing stores in the PCA are aimed at a different market and cater predominantly for top-up shopping.

4.22 Having identified a qualitative need for main foodstore provision in North West Cambridge, NLP tested three scenarios to look at quantitative need and identify the most appropriate level of additional convenience floorspace taking into account the committed and pipeline developments.

4.23 Scenario 1 considered the use of constant market shares (i.e. the same amount of money is spent in shops in the PCA even though there would be more retail provision), however NLP conclude this approach is not realistic. Scenario 2 assumes new retail provision in NW Cambridge will mean that residents in the PCA and SCA spend more of their overall expenditure on convenience goods in the local area, calculated on a pro rata basis in line with the increase in turnover.

4.24 Scenario 3 is the most realistic as it assumes that provision of main food retailers in the PCA would achieve trading levels and a market share from the PCA similar to other main stores in the Cambridge region. Therefore more of residents' expenditure will be retained within the study area. This will also potentially result in trade diversion and claw-back as well addressing some of the less sustainable travel patterns towards stores outside of the PCA such as Bar Hill and Milton.

4.25 Main foodstore provision in the NW will retain more of the expenditure from the existing population within the PCA, however, assumptions from SRS suggest a retention rate of around 32%. This is however, a cautious recommendation and the reality may be considerably higher when the urban extension sites are built. Residents at the University site are likely to have low car ownership and are likely to live and work at the same site, this gives further reason to consider that the retention of expenditure figures within the NLP study are a cautious estimate.

4.26 Whatever the size of store provided, factors such as shop format, brand loyalty, work location and the proximity of a major superstore at Bar Hill will always mean that some expenditure from the PCA outflows to other locations. The purpose of the study is to assess which option would offer a sustainable and viable main convenience offer for NW Cambridge and serve the needs of the existing and new community.

4.27 The SRS identifies two viable options for addressing the qualitative and quantitative need for additional floorspace in NW Cambridge. Either one store of 2,500 sq m net convenience (3,500 sq m net retail) which is similar in size to the existing Tesco store at Yarrow Road (known as Tesco, Fulbourn) or Asda at the Beehive Centre, or two stores of 1,500 sq m net convenience (2,000 sq m net retail) which is slightly larger than the Sainsbury's store in the centre of Cambridge and slightly smaller than the Tesco at Milton. Appendix 1 provides further detail about the size of stores in Cambridge and South Cambridgeshire for comparison. In terms of location, NIAB and the University site come out joint first with Orchard Park ranked third. The SRS suggests that assessing other factors such as transport and phasing should also be used to assess site suitability.

4.28 The SRS has looked at the implications of main foodstore provision by 2011 in the N W quadrant. Provision of a store of 2,500 sq m convenience by 2011 would use up all the residual expenditure and more and would therefore potentially lead to the delay in the delivery of smaller stores in the other two centres. A store of approximately 1,500 sq m net convenience could be accommodated at 2011, but NLP do not feel this would adequately compete with other main stores. The primary need for a store in 2011 is from the requirements of the existing population; this need expands as the development sites come forward. A store of 1,500 sq m net convenience and 2,000 sq m total net would be appropriate in 2011 and this is recommended for an early phase of one of the sites. The store of 2,000 sq m net could be extended to 3,500 sq m net in the future or another store of similar size could be provided within one or the other local centres. The delivery of early retail floorspace has occurred in a number of comparable urban extensions.

4.29 Consistent with the PPS4 definitions set out at the beginning of this section, the one store option of 3,500 sq m net retail will be referred to as a superstore and the two store option of 2,000 sq m net retail will be referred to as supermarkets during the rest of this report, which will also help distinguish the difference between the different scale and type of store.

Summary of Transport Study

4.30 The North West Cambridge Retail Transport Study was commissioned by Cambridgeshire County Council on behalf of Cambridge City Council and South Cambridgeshire District Council and produced by Atkins. It is designed to complement the Supplementary Retail Study (SRS), building upon the results from this study. The key requirements of the study have been to:

- Understand the transport implications arising from the location of a new major food store in one or more of the local centres, with reference to the wider City and South Cambridgeshire areas;
- Understand the ability of a new major food store in one or more of the main development sites to contain trips within NWC relative to a base of the small supermarkets currently envisaged in each local centre, consistent with current planning policy and;
- Produce a range of transport data outputs for each option including impacts on travel times, distances and carbon emissions.

4.31 The Transport Study therefore tests the favoured options from the SRS i.e. two supermarkets of 2,000 sq m net or one superstore of 3,500 sq m net. For the purposes of transport modelling the consultants used the equivalent gross floor areas of these stores, which equates to 3,000 sq m for the supermarkets and 5,500 sq m for the superstore. The study looked at the baseline situation (referred to as 'planned development only') and the different possible scenarios, depending upon store size and site (which are described as 'tests'), as summarised in Table 1.

Table 1: Scenarios tested in the Transport Study

Scenario	University	NIAB	Orchard Park
Planned Development Only	Current Policy Provision Only	Current Policy Provision Only	Current Policy Provision Only
Test 1	5,500 sq m store	Current Policy Provision Only	Current Policy Provision Only
Test 2	Current Policy Provision Only	5,500 sq m store	Current Policy Provision Only
Test 3	Current Policy Provision Only	Current Policy Provision Only	5,500 sq m store
Test 4	3,000 sq m store	3,000 sq m store	Current Policy Provision Only
Test 5	3,000 sq m store	Current Policy Provision Only	3,000 sq m store
Test 6	Current Policy Provision Only	3,000 sq m store	3,000 sq m store

Note: All floorspace figures are gross.

4.32 In undertaking this work, a wide range of factors have been considered including the ability of a store in NW Cambridge to source a large proportion of its custom from the immediate vicinity; the car and non-car mode shares of trips to a new store; the carbon impacts of a new store both locally and across the wider Cambridge and South Cambridgeshire areas; and the impacts on traffic delays at junctions in the area surrounding NW Cambridge.

4.33 A bespoke retail gravity model was created for the purpose of the Transport Study, taking its input data from sources that have been used in the SRS and ensuring consistency with previous work. This model considers the relative size and accessibility (in terms of travel distance and travel time) of existing convenience retail supermarkets and each proposed store, in order to determine the shopping trips that take place under each test scenario. The model was calibrated and validated against observed data from the SRS, prior to forecasting to 2021 assumptions.

Summary of Transport Study's Findings

4.34 The Transport Study assesses the total amounts of carbon emissions, travel distances and travel times for the "planned development only" baseline option, and for 6 options for additional retail in NW Cambridge tested. The results of the study indicate that additional retail in NW Cambridge would have very little (almost negligible) effect. The study shows (in Table 4.1, 4.2 & 4.3 of the transport report) that, compared to "planned development only", all of the six tests would result in less than 1% change in carbon emissions, travel distances and travel times.

4.35 The Transport Study indicates that over the wider area (i.e. secondary catchment) the provision of additional retail would slightly reduce the total amounts of carbon emissions, travel distances and travel times compared to "planned development only". However, there would be a consequent localised increase in carbon emissions, travel distances and travel times within the primary catchment. Additional large scale retail provision results in an overall reduction in the length of food shopping trips, but causes a local intensification of travel due to shopping trips being retained in NWC. However, as stated above, these travel effects are very slight. Within the Cambridge urban area as a whole, additional retail would have an insignificant effect with respect to carbon emissions, travel distances and travel times.

4.36 The impact of retail development on the local highway network has also been assessed as part of the Transport Study. The predicted delays at key junctions in the morning peak; inter-peak and evening peak periods are reported. (Tables 4.4, 4.5 and 4.6 of the transport report respectively). The findings indicate that, as would be expected, the traffic impact of additional retail on the local highway network would be greatest in the evening peak period. However, the scale of impact compared to "planned development only" is minor.

4.37 In terms of store size and its influence on modal share, the results of the Transport Study indicates that the further customers travel to shop, the more likely trips will be made by car. The superstore options (i.e. tests 1-3) will have a larger catchment than two supermarket options (i.e. tests 4-6), and hence will have a larger travel mode share by car. The two supermarket options have smaller catchments, which presents opportunities for non-car travel. This suggests that single superstores are more likely to be main food facilities compared to two supermarkets: the latter are likely to have a greater top-up shopping role. The Transport Study suggests that main food shopping is predominantly by car, whereas top-up shopping is more able to adopt non-car modes of travel.

4.38 The Transport Study identifies car mode share for new stores situated at any of the three development sites. The car mode share (note: not number of trips) for the two supermarkets options is lower compared with the single superstore options. This is consistent with the statement above and indicates that two-store options involve shorter travel distances, which encourage a greater proportion of non-car trips.

4.39 By looking at the 12-hour annualised figures for vehicle kilometres (for the year 2021), it can be seen that a single store located at the University site or at NIAB would claw-back 852,523 km or 1,187,142 km of vehicle travel distance respectively (i.e. compared to “planned development only”). Two supermarkets, located on both the University and NIAB, would claw-back only 817,648 km of vehicle travel distance (Fig 3.4 in the Transport Study illustrates that this claw-back would be predominantly from Tesco Bar Hill). These figures indicate that a single superstore would claw-back a greater number of main-food trips to NW Cambridge compared to the two supermarket option i.e. again suggesting that the two supermarket option would have a greater top-up role.

4.40 There is no overwhelmingly clear “winner” in terms of transport amongst the six options tested. Although the Transport Study does point towards the additional retail provision being split between the University and NIAB sites as the favoured option, there is very little difference in terms of transport effects between this option and the other options tested. This is because the increase in retail floorspace above the baseline (pipeline/ committed) in all of the tests is relatively small which therefore has little impact on the baseline transport position.

Summary of Other Planning and Design Work

Design Objectives

4.41 The current planning policies for the Local Centres in the three developments in NW Cambridge were intended to provide a range of retail and community facilities and public spaces to provide a focus for the new communities to meet their needs and provide a place where people can come together. The provision of main food shopping, be that a superstore or supermarket, brings particular design challenges in terms of providing a store that can be integrated within the Local Centre in both physical and visual terms.

4.42 A superstore has the potential to create significant problems in terms of the successful integration of the building and use type into the types of Local Centres planned for the NW Cambridge quadrant. Many supermarkets and superstores relate poorly to their surroundings, which is the result of their ‘off the shelf’ standardised building types, and infrastructure needs. However, there are a growing number of recent schemes that have challenged the more conventional approach to create developments that better integrate with their surroundings. These should be used to inform the development models for new provision in the NW quadrant.

4.43 One of the problems associated with typical supermarket and superstore design is the large inefficient footprints that effectively create a large hole in the middle of a development often where it is desirable to increase densities and create a ‘mass’ of population. As such they can severely limit the opportunity to create successful places. Conventional supermarkets and superstores, and particularly the latter, can make it more difficult to deliver other shops and retailers around them due to their scale and diversity of product lines that they stock.

4.44 Key issues include the bulk of the building and design of its elevations and the provision and design of car parking. A key principle is to ensure high quality design that integrates with the local centre and facilitates a sense of place.

4.45 The City Council and SCDC Joint Urban Design Team have carried out work in relation to design objectives for supermarkets and superstores and how stores of different sizes can be effectively integrated into the local centres in the NW of Cambridge. They have looked at a number of case studies throughout the country and locally which demonstrate that it is possible to take alternative approaches to the design and integration of foodstores in urban places that can provide successful places.

4.46 The design principles recommended for the development of Local Centres incorporating a foodstore in NW Cambridge are set out below:

What to avoid:

- Classic monolithic ‘big box’ development - often stand-alone, with exposed ‘dead’ frontages, create particular problems for active and attractive streets.
- Single ‘mono-use’ sites.
- Inefficient layouts.
- ‘Anywhere’ developments.
- Vehicle dominated development e.g. large surface car parks.

What to do for the Local Centre:

- To create a vital Local Centre with a range of retail and other Local Centre uses by providing them either on the frontage of the foodstore or opposite the store to create a public realm area in the form of a square of street (See Figure 3).
- Ensure activate frontages onto the street/public realm.
- Provide surveillance and activity.
- Consider the nature and quality of the space the building faces.

What to do for a foodstore:

- ‘Wrap and cap’ with other uses – Large stores can be designed to become compatible with fine-grained urban settings by mixing horizontally and/or vertically with other uses, which may involve (diagram to be provided):
  - ‘wrapping’ the perimeter on the street faces with smaller units e.g. small shops or other Local Centre uses, with a narrow frontage to the foodstore between other uses providing an entrance to the main foodstore behind (see Figure 4);
  - ‘capping’ the store with upper floors on the ‘air space’ above the box;
  - incorporating a well designed façade for roof top parking if appropriate;
- Limit blank walls.
- Direct external access to units wrapped around the foodstore, so that the community can use separately from food shopping, e.g. cafés, and increasing their ‘transparency’ to the street (see Figure 5).
- Minimise car-parking footprint e.g. multi-storey, sharing with other uses to include linked trips and physically breaking up the car parking within and around the foodstore/Local Centre.
- Provide high quality car parking area which are well landscaped, well lit, and provide high quality surface materials
- Minimise site area and building footprint both through efficiency of land take to avoid creating unused spaces and unnecessarily long pedestrian walking distances.
- Consider as part of the overall balance of provision in the Local Centre.
- Provide discrete servicing in appropriate locations away from main frontage.

4.47 The differences in accommodating a supermarket or superstore in a Local Centre are obviously due to the difference in store size, which will impact directly on the following:

- Block size – the larger the foodstore the larger the block needs to be and the higher number of car parking spaces to accommodate.
- Street design – infrastructure, trip levels and servicing.
- Overall density – potentially reduced at the centre due to the land take of the foodstore.
- Integration with surrounding land uses – standard foodstore forms do not do this particularly well.
- Impact on the range of other shops and services able to ‘compete’ against the superstore or supermarket.

Figure 3: Diagram showing a supermarket as part of a public square surrounded by mixed use developments

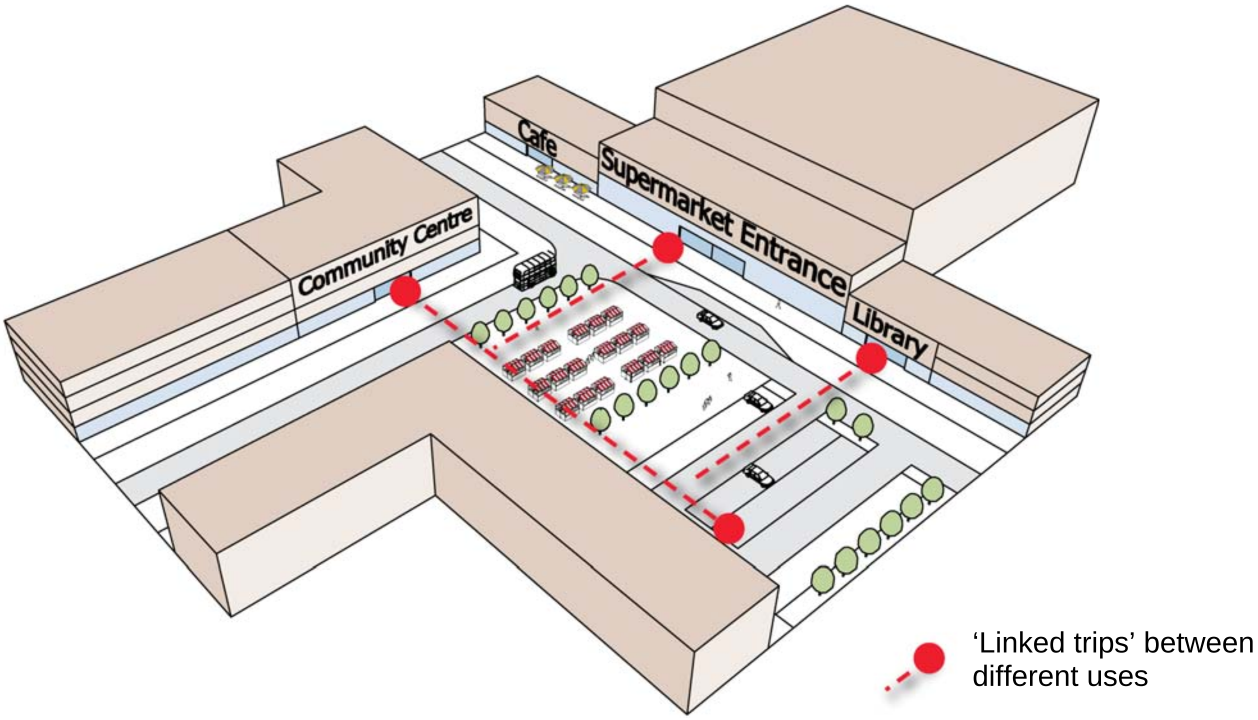
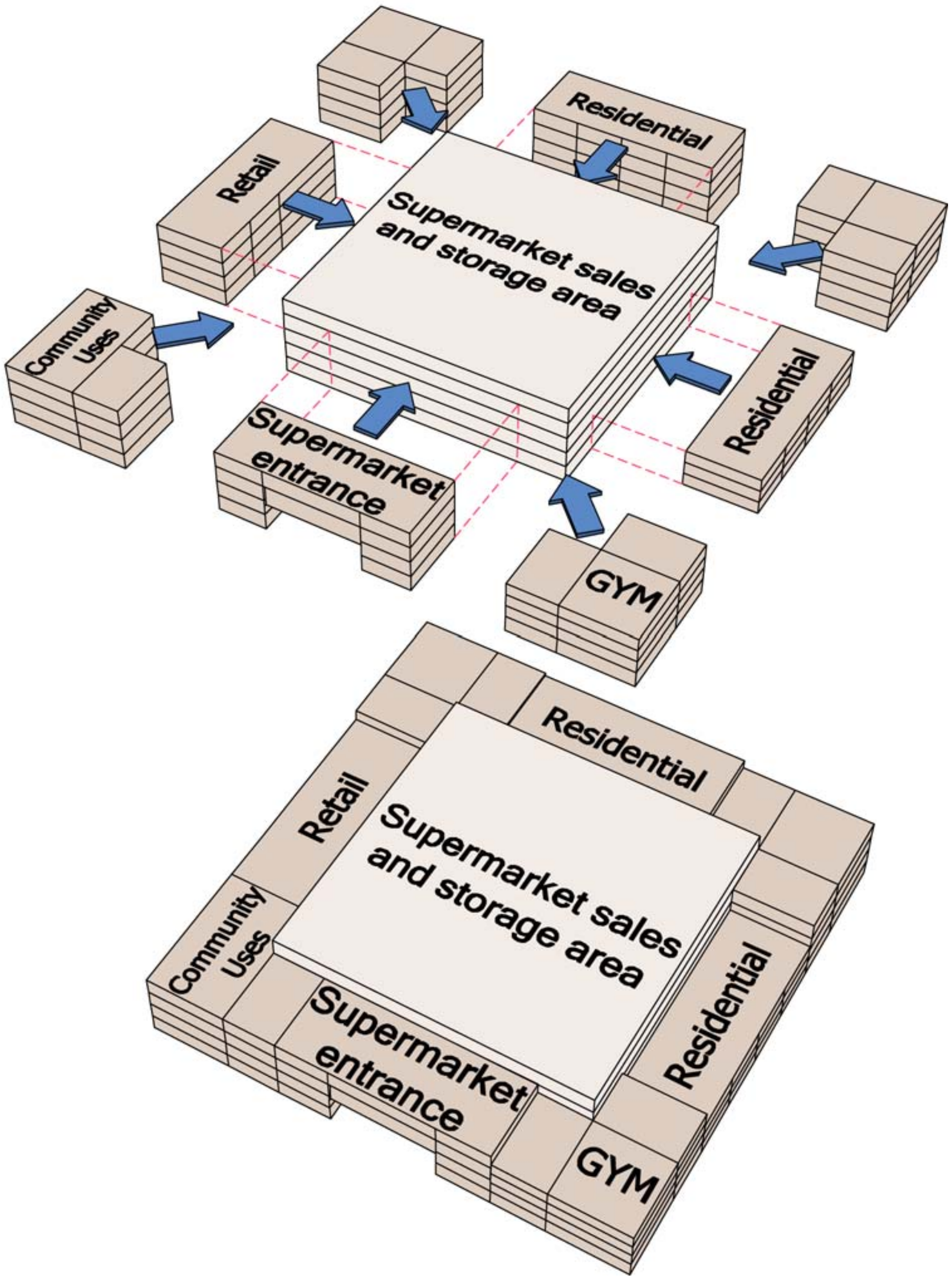


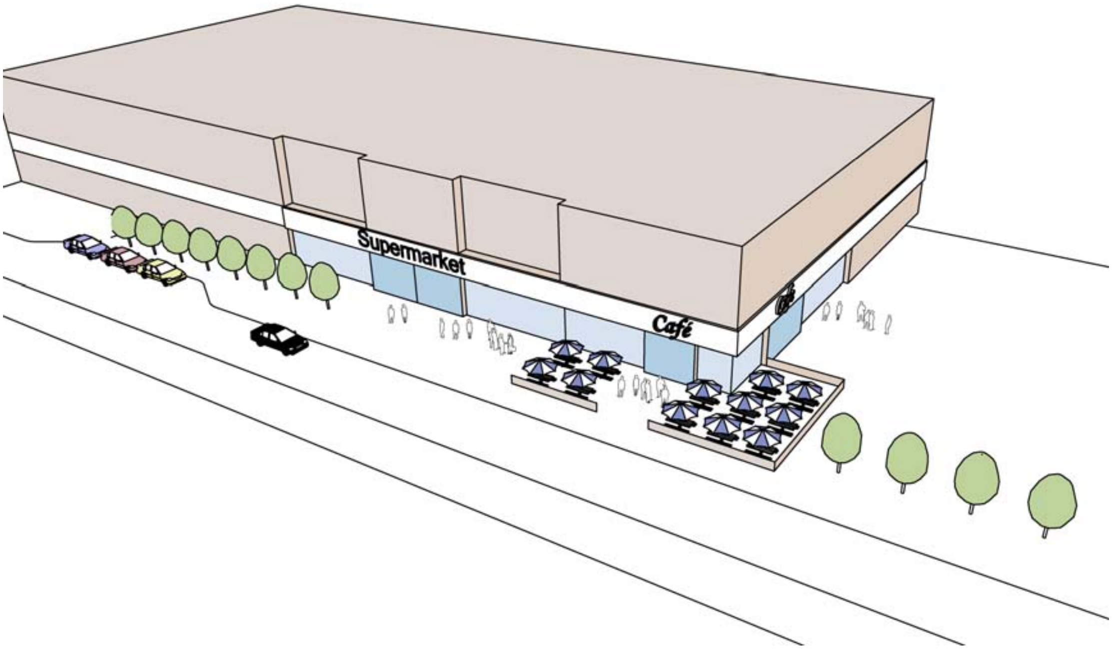
Figure 4: Diagram showing 'wrapping' of supermarket with other uses



Large stores and other big-box units can be modified to become compatible with finer-urban grain settings by mixing with other uses horizontally and/or vertically. This can be done in a number of ways:

- **Wrapping the perimeter of the block with smaller units such as residential or other retail uses;**
- **Making use of the roof space above supermarkets with car parking or garden spaces;**
- **'Externalising' more active uses such as a cafe and increase the transparency of the street.**

Figure 5: Diagram showing supermarket with external café use



Sustainable Design and Construction

4.48 Both Councils are committed to tackling climate change and delivering low carbon sustainable developments. As such, further work has been carried out to consider the sustainable design and construction standards that could be applied to foodstores in the North West quadrant.

4.49 The current policy background is particularly strong for the University site covered by the North West Cambridge Area Action Plan. Clause 3 of Policy NW24: Climate Change and Sustainable Design and Construction relates to non-residential development and would therefore apply to foodstore development. This policy requires that BREEAM (the Building Research Establishment's Environmental Assessment Method) 'Excellent' standards should be achieved and that non-residential developments will reduce predicted carbon emissions by at least 20% through the use of on-site renewable energy technologies only where a renewably fuelled decentralised system is shown not to be viable.

4.50 Both Cambridge City and South Cambridgeshire District Councils have adopted policies requiring development over 1,000 sq m to ensure that at least 10% of their predicted energy requirements are met through the inclusion of on-site renewable energy (Policy 8/16 of the Cambridge Local Plan, and Policy NE/3 of South Cambridgeshire's Development Control Policies DPD). The role that energy efficiency can play in reducing carbon emissions is recognised in Policy NE/1 of the South Cambridgeshire Development Control Policies DPD, which requires applicants to demonstrate how their proposals will maximise the incorporation of energy conservation and efficiency measures, aiming for a minimum 10% reduction in Co_2/m^2/year compared to Part L 2006.

4.51 The Councils have carried out research into the corporate environmental standards of some of the UK's leading food retailers and a number of case studies of foodstores using best practice sustainable design and construction techniques. It is clear from the case studies that supermarkets themselves are increasingly targeting the achievement of BREEAM 'Excellent' for their new stores where practical, and are developing standard portfolios of technologies and construction techniques to be applied to new developments to enable them to meet their carbon reduction goals.

4.52 Some of the common techniques that have been used include:

- Use of sustainably sourced timber frame construction
- Utilisation of rainwater harvesting
- Maximising natural day lighting using solar pipes and roof lights
- Use of energy efficient refrigeration systems, using natural refrigerants with lower global warming potential where possible

- Use of LED lighting
- Mix of renewable and low carbon technologies
- Maximise recycling of construction waste
- Use of passive/natural ventilation
- Green roofs

4.53 There will be variations between the construction methods and technologies used on a site-by-site basis. Site constraints and the physical size of stores may mean that certain technologies will not be practical or viable. The building typology of the stores themselves may also have an impact on solutions, with some of the wrap and cap options potentially impacting on the ability of a store to maximise day lighting.

4.54 A further consideration is whether the size of a store has an impact on its ability to meet higher standards of environmental performance. An analysis of the case study stores in terms of their size and BREEAM standard achieved is provided in Table 2 below. This shows that retailers are able to achieve BREEAM 'Excellent' for a range of store sizes.

Table 2: Size of case study stores and their BREEAM Standard

Case Study Store	**Size[3]**	*BREEAM Standard*
Sainsbury's Greenwich	5,110sq m (gross)	Excellent
Asda Bootle	6,500 sq m	Excellent
Tesco, Ramsey	3,610 sq m (gross)	Excellent
Tesco, Cheetham Hill	4,831 sq m	Very good
Waitrose, Altrincham	3,019 sq m (gross)	Very good
Sainsbury's Dartmouth	3,130 sq m (gross)	Excellent
Morrisons Halifax	4,810sq m (gross)	Excellent

4.55 The size of a store should not be seen as a reason to stifle innovative responses to reducing the environmental impact of a building. There may be concerns that with smaller scale stores, certain renewable or low carbon technologies may not be viable, for example the use of CHP. However, the Tesco store at Ramsey (the world's first "zero carbon" store), which has a gross floorspace of 3,610 sq m utilises a renewably fuelled CHP system, while the Sainsbury's Dartmouth store utilises a combination of technologies including wind turbines and biomass boilers. When considering renewable or low carbon technologies, there may also be merit in considering the wider setting of future stores, for example where these are set within local centres or whether there are nearby residential units that could also benefit from being linked to district scale systems. The reduction of the energy

[3] Data on the size of stores is taken from planning application files/local planning authority websites

consumption of stores through the use of energy efficiency measures is also a vital element and the UK's major food retailers are increasingly adopting the use of energy efficient refrigeration systems as a common approach in all new stores.

4.56 Bearing in mind the policy context for the NW quadrant, the following approaches are recommended:

- NW AAP site: given the requirements of Policy NW24 of the Area Action Plan, any non-residential development is required to meet BREEAM excellent (with a further requirement for 20% renewables where a renewably fuelled decentralised technology is not viable).

- Other sites (NIAB, Orchard Park): the Councils would encourage developers to achieve BREEAM "Excellent" on all other retail development in the North West quadrant. Consideration will need to be given to meeting these standards from the earliest possible opportunity in the design and building procurement process in order that the standards sought can be achieved without a significant impact on costs. Policy requires that foodstores over 1,000 sq m would also have to provide at least 10% of the stores predicted energy requirements from on-site renewables. Consideration should also be given to future-proofing stores to ensure that they, at the very least, meet the forthcoming changes to Part L Building Regulations later this year. Consideration to meeting higher BREEAM standards should also be given even where planning permission for retail development has already been granted at lower standards.

Timing and Phasing

4.57 The Retail Study has focused on appropriate form and scale of foodstore provision at 2021 once all development in the North West area is completed. However, there are emerging developer proposals for early foodstore provision and the capacity for either a superstore or two supermarkets to be provided ahead of 2021 needs to be considered along with implications of delivery for the Local Centres.

4.58 The SRS concludes that early foodstore provision would be supported in qualitative, and consequentially quantitative terms, to support the existing population. However, it identifies a risk that early provision would prejudice the early delivery of foodstore provision in the other local centres in NW Cambridge. The SRS recommends that provision in the early years should be limited to 2,000 sq m net supermarket. If a superstore is to be provided then the SRS recommends that this should initially be a smaller store of 2,000 sq m net but designed to have expansion capability to deliver 3,500 sq m net superstore at a later date following a sizeable increase in the catchment population and expenditure available. If two supermarkets are to be provided, then there is capacity for one to be provided early and the second to be provided later, if there proves to be such commercial demand. The issue would therefore arise as to which of the two stores should be provided early.

4.59 A phased approach to provision of a superstore would not be as effective from a sustainable design and construction point of view as providing all of the floorspace from the start. The future provision of mezzanine floors would impact upon the sustainability features such as natural day lighting from roof lights and sun pipes with a subsequent increase in energy consumption from additional lighting. Future expansion of stores could also impact upon renewable or low carbon energy technologies unless these are specified to allow for future increases in consumption levels brought about by an increase in floorspace. Conversely, over-specification of technologies at the initial stages could negatively impact on the efficiency and reliability of these systems. Applicants may decide to completely replace existing technologies with systems specified for the new store size but this would lead to additional expense for the applicant and would be a waste of resources, particularly when embodied carbon is taken into consideration. The provision of store extensions may also encroach on other measures implemented to gain BREEAM credits such as landscaping to increase biodiversity, or the provision of space for cycle parking or recycling facilities.

4.60 The Transport Study advises that if a main foodstore were to be opened earlier than 2021 there could be additional transport impacts to those identified that would need to be investigated as part of the transport assessment for any specific proposals. Any implications arising from the review of the A14 improvements scheme would need to be considered and may vary depending on the location of any food store (s). The dwelling catchment around the store has been shown to impact on the stores mode share and average trip costs. If a new store were opened before the dwellings were complete it would draw its trade from a wider catchment area and therefore average cost and car mode share for travel to that store would be higher until the remainder of the dwellings were in place. Timing of infrastructure could also be a factor on the average cost and car share mode e.g. A14 improvements on travel to Bar Hill Tesco Extra.

4.61 In addition to the above, it is also important to consider the individual circumstance of the three developments and the role a foodstore could have in the delivery of those developments. In terms of the University site, the University work on the masterplanning for the site is underway and indicates a supermarket of 2,000 sq m net retail. The University is proposing early provision of the supermarket as part of an initial phase of this development including the early delivery of the local centre. Whilst the planning application for NIAB 1 proposes a Local Centre with a small supermarket, it has been suggested by the developers that if a larger foodstore is justified then the local centre at NIAB should be considered as a potential location. In the case of Orchard Park, half of which is now built, the possibility of main foodstore provision arose as part of a range of alternative uses being considered by the partners to reinvigorate activity on the site in the face of the economic downturn.

4.62 It is therefore important to consider any advantages of early provision compared with risks of delivering the rest of the retail proposals for NW Cambridge and being aware of the potential transport implications of early delivery.

Community Development

4.63 In order to build quality of place and enable community cohesion, space within growth areas should be made available for local shops and services. Whilst developing a sense of community by creating a meeting point for local people, this will also serve to minimise car dependence by serving day-to-day needs. This is in keeping with the aims set out by the Cambridgeshire Quality Charter for Growth. The importance of Local Centres with a range of service oriented functions should not be underestimated.

4.64 Local Centres act as the focus for communities and help to establish an area's special character and identity. By co-locating many services and facilities, there can be a more efficient use of land and buildings through shared buildings and facilities, which can lead to better customer service and considerable savings especially for operational efficiency. The provision of such services and facilities in a Local Centre enables small-scale employment to be located within and/or alongside the local centre to reinforce its function.

4.65 Local Centres should be linked to the network of pedestrian and cycle routes as well as public transport routes, in order to minimise car dependence. A single centre enables a journey for one purpose to serve another, thus reducing the overall number and length of journeys and providing opportunities for social interaction.

4.66 An analysis of other Local Centres in Cambridge shows that these often have service orientated functions or specialist shops which would be able to exist successfully alongside a superstore or supermarket as they would not be competing against each other. For example uses such as hairdresser, beauty salon, banks, estate agent, dentist, café or specialist shops e.g. selling decorating products, floor coverings, specialist bikes. All of these uses are typical of Local Centres found within Cambridge. The use of planning conditions may be appropriate to limit the inclusion of certain uses or services within the foodstore to enable the development of smaller shops in the local centre. There are examples of where this has happened in Cambridge and South Cambridgeshire. The planning permission for the Waitrose store in Trumpington has conditions that exclude pharmaceutical or post office services without approval by the Local Planning Authority in writing. Similarly the Section 106 agreement for the foodstore in Cambourne (now a Morrisons) prevents a dispensing chemist, dry cleaners, bank and post office.

4.67 However, research suggests that where only a large supermarket is available, which serves a large geographic area, this can have a detrimental impact on the level of social exclusion experienced by those on low incomes. Research indicates that those experiencing food poverty often have problems with transport and so the number of shops selling affordable food is particularly important. Furthermore, changes in distribution of retail units has given rise to a shortage of food shops in low-income areas. This change in retail distribution has taken place over a number of decades, with the advent of larger superstores and metro supermarkets and the loss of independent stores. Given the greater distance that people often have to travel to shop, accessibility is a key issue. For the elderly, disabled and those with small children, this can be highly problematic as public transport may not serve the relevant route regularly and car ownership tends to be lower in urban areas and amongst lower income households. A study on retail competition and consumer choice[4], which considered access and choice for food shopping in Portsmouth, found that people on low incomes felt that their lives had not been enriched by the large-scale development of supermarkets and the loss of local shops. Many felt that they had no choice but to depend on supermarkets, which were often hard to get to by non-car modes of travel. On reaching larger retail stores, the large size of goods and bundle offers may not be appealing to people without a car and for lower income households. In order to avoid compounding inequalities of access, Local Centres should therefore include a range of services.

4.68 The successful development of Local Centres at the heart of new developments is critical in bringing together the whole development, thus encouraging the creation of a cohesive community and it is important that foodstore provision does not undermine this principle, and therefore enhances the quality of life of existing rand future residents.

4.69 Community involvement throughout this process is crucial, which means that it is important to seek people’s views on the pattern of foodstore provision on the quality of place and to help us understand the implications on community development.

[4] Clarke, I. et al (2004) Retail competition and consumer choice, Lancaster University Management School briefing report.

Shopping Behaviour

4.70 Shopping behaviour is extremely complex and falls to individual circumstances and choices. Shopping trips are described as either main food shopping, which would be less frequent bulk grocery shopping using a trolley, or top-up shopping which are more frequent trips where the customer is more likely to use a basket. The SRS (at paragraph 4.19) describes the key factors that influence main shopping as:

- Store proximity and relative accessibility
- Pricing
- Brand loyalty
- In-store and car parking congestion
- Store size and format – which influences range of goods
- Online Shopping and Home Delivery

4.71 The planning system does not distinguish between retailers, but the brand may obviously have an effect on shopping patterns. Shoppers may prefer one larger store, as this will have a larger range of goods including some comparison floorspace. Alternatively the provision of two supermarkets would provide two different brands which would provide more choice. Recent market evidence referred to in the SRS indicates that there has been an emergence of new smaller format grocery stores and that there could be commercial interest in this size of store. The SRS is clear that the two supermarkets would not be large enough to effectively compete with other superstores in Cambridge and would provide more localised shopping trips in NW Cambridge. It is likely that people would still make trips to superstores in order to access the full grocery shopping offer, although this may be on a less frequent basis.

4.72 Recent shopping trends have seen a rise in online shopping for all goods including convenience since being launched by a number of the main operators in the early 2000s. Statistics show that around 13% of adults shopped online for groceries in 2009, generating around £3.6 billion. Estimations by IGD (Institute of Grocery Distribution, Food Retail Analysts) are for this figure to double by 2014.

5. ANALYSIS OF EVIDENCE BASE

5.1 Having considered the retail, transport and other planning considerations separately, it is necessary to bring together the findings of this work and consider the most appropriate options for food retail provision in NW Cambridge in both the short and long term.

5.2 The SRS shows that the policy baseline situation of the pipeline / committed convenience floorspace would not adequately address the qualitative and consequential quantitative need for convenience retail provision to 2021. In addition, the Transport Study finds that this would have disbenefits for the local residents causing them to travel further for main food shopping.

5.3 The SRS identifies a need for main foodstore provision in NW Cambridge and two appropriate options for how this could be provided as at 2021. These are either a superstore of 2,500 sq m convenience floorspace (which equates to 3,500 sq m net or 5,500 sq m gross) or two supermarkets of around 1,500 sq m convenience floorspace (which equates to 2,000 sq m net or 3,000 gross).

5.4 The Transport Study assessed both of these options looking at the different possible combinations of location offered by the three different sites. The study concluded that the difference between the options was marginal in all of the six tests carried out. However, the two supermarket option came out slightly better than a single superstore.

5.5 Looking at the most appropriate locations for the potential foodstore, the SRS used a number of criteria to assess the relative merits of the three centre locations. The rankings are provided in Table 5.11 of the SRS. The SRS concludes that greater weight be given to qualitative need considerations including the distribution of centres and main foodstores in Cambridge and the extent of the existing and new population served by a large foodstore within easy walking and cycling distance.

5.6 All three proposed local centres have merit, with the University site and NIAB ranked similarly and Orchard Park ranked a close third. Orchard Park is the best served by existing convenience stores within a 5 minute drive time, including a main foodstore, the Tesco at Milton. It is also the best served site in terms of nearby centres, although this is based on driving distance and no centres are located within 500m walking distance of the site. Therefore there is the least qualitative need for the store to be located here. The proposed centre at Orchard Park would serve the greatest existing population by walking, cycling and driving as it is located on the edge of the existing built up area, however it would serve the lowest new population as the number of proposed dwellings is lower at Orchard Park than the other two sites. Taking these factors together, the SRS suggests that either the

University of the NIAB site is likely to offer a better location than Orchard Park.

5.7 The Transport Study similarly ranks the options which include Orchard Park behind the other two sites in terms of the objectives to minimise CO_2, maximise non-car mode share and reducing the need to travel by car (see Table 5.1 of this study).

5.8 There is no strong conclusion from the SRS and the Transport Study as to which is the best option in terms of size of store i.e. one superstore or two supermarkets. The SRS indicates that the superstore would provide the 'best fit' in terms of meeting qualitative and quantitative need, whereas the Transport Study is slightly in favour of the two supermarket option. From a design point of view, a supermarket would be easier to integrate into a local centre than a superstore, although this is not impossible provided that good urban design principles are followed. As described earlier an ‘Excellent’ BREEAM rating can be achieved at either size of store.

5.9 The phasing of provision is also a relevant factor and the SRS advises that the provision of either a superstore or two supermarkets should be phased if provision is made ahead of 2021 in order to help enable the delivery of small supermarkets in the other centre(s). If it were a superstore the issue would be the practicality of phasing its provision and the difficulties of making it a sustainable form of construction. If it were two supermarkets there would be a question around which location came forward early and which was held back and the nature of the local centre in which the supermarket is delivered later.

5.10 As a result of this analysis, it has been decided that the options that include the Orchard Park site ie a superstore on Orchard Park, supermarkets on Orchard Park and the University site, or supermarkets on Orchard Park and NIAB site are the least favoured options and have not been put forward for public consultation. However, it has been decided to include the baseline policy option for completeness, even though as described above it has many limitations. As there is no clear steer on which size of store would be most appropriate in NW Cambridge, both sizes of store merit further consideration as possible options on the University and NIAB sites.

5.11 The four options that are being put forward for public consultation are therefore as follows:

- Option A – Planned Development Only i.e. local foodstores in each of the three Local Centres (this is the policy baseline situation, with the committed and pipeline floorspace and no further foodstore provision)
- Option B – Two supermarkets of 2,000 sq m net floorspace (1,500 sq m net convenience), one at the University site and one at NIAB and the committed floorspace at Orchard Park

- Option C – One superstore of 3,500 sq m net floorspace (2,500 sq m net convenience), at the University site and the committed / pipeline floorspace at NIAB and Orchard Park
- Option D – One superstore of 3,500 sq m net floorspace (2,500 sq m net convenience), at the NIAB site and the committed / pipeline floorspace at the University Site and Orchard Park.

6. PROPOSED OPTIONS

6.1 This section describes the options being put forward for public consultation and sets out the advantages and disadvantages of each, using information from the evidence base. The Councils would like to hear your views on each of the options and your preferred option and reasons for choosing this. Questions are provided which we would like your views on.

Option A – Planned Development Only (this is the policy baseline situation, with the committed and pipeline floorspace and no further foodstore provision)

Floorspace (sq m)	University	NIAB	Orchard Park
Net convenience	1,625	1,170	623
Net	1,625	1,170	623
Gross	2,500	1,800	958

6.2 This reflects the current planning policy position for the Local Centres in the three developments in NW Cambridge. This does not provide for a main foodstore but instead provides for small supermarkets catering for local needs and top up shopping along with a range of other units within the local centre providing other local services and facilities. This assumes that all the net floorspace is convenience floorspace and there is no comparison.

Advantages and Disadvantages of Option A

6.3 The advantages of this option are:

- Smaller sized supermarkets would be easier to integrate into the design of all three Local Centres.
- Less draw from outside NW Cambridge area and therefore this option does not lead to more localised traffic problems.
- It will be easier to develop the other units within the Local Centres as they wouldn't be dominated by larger foodstores. A wider range of smaller shops could provide a more balanced and vibrant local centre.

6.4 The disadvantages of this option are:

- The Local Centres will help serve the new developments but will not significantly address the qualitative need for a main foodstore(s) resulting in a high proportion of existing residents shopping elsewhere and therefore the continued outflow of expenditure to other main foodstores in Cambridge.
- The unsustainable travel patterns to other main foodstores in Cambridge will remain with associated carbon impacts.

6.5 As such this option is not supported by the evidence base, but is included for consultation to enable full public opinion to be sought.

Question 2: Do you support or object to Option A? Please provide reasons.

Option B – Two supermarkets of 2,000 sq m net floorspace - one at the University site and one at NIAB, and the committed floorspace at Orchard Park.

6.6 The table below sets out the equivalent floorspaces (i.e. net convenience, net and gross) for this option, and shows the committed convenience development at Orchard Park.

Floorspace (sq m)	**University**	**NIAB**	**Orchard Park**
Net convenience	1,500	1,500	623
Net	2,000	2,000	623
Gross	3,000	3,000	958

6.7 To give a comparison, the size of each of the supermarkets proposed is slightly larger than the Sainsbury's store on Sidney Street in the centre of Cambridge, which has a net convenience floorspace of 1,260 sq m (1,326 sq m net). However, a direct comparison cannot be made because this is a City Centre store catering for only non-car modes of transport, and a store in NW Cambridge would be of a different format, providing car parking and seeking to provide for a main weekly shop. It would be slightly smaller than the Tesco store at Milton, which is 2,244 sq m net convenience (2,327 sq m net) (see the table in Appendix 1 for the floorspaces of foodstores in Cambridge and South Cambridgeshire).

Advantages and Disadvantages of Option B

6.8 The advantages of this option are:

- Supermarket sized stores would be easier to integrate into the design of the proposed Local Centres at the University and NIAB sites.
- Although this is not considered the 'best fit' option in the SRS, it would provide an alternative way of using the capacity identified to contribute to meeting qualitative needs. The Councils have had retailer interest in this size of store, which suggests that it would be commercially viable. The SRS suggests that stores of this size are more likely if operated by one of the existing food retailers in Cambridge, to complement but not compete with their existing provision.

- The stores would meet much (but not all) of the main food shopping needs of each urban expansion area and the nearby parts of NW Cambridge. The stores would be closer in size to that contemplated in the proposed Local Centres.
- It would lead to more localised shopping trips which would allow the use of different modes of travel, such as cycling or walking. People could be encouraged to use bikes to carry out their shopping trips by having schemes to hire out bike trailers. This is already being done successfully at the Waitrose store in Cambridge.
- It would lead to a more balanced provision of foodstores in the three Local Centres, with no one centre dominant, but with two Local Centres anchored by a supermarket and the third by a smaller supermarket.
- The SRS shows that the committed pipeline size store in Orchard Park of 958 sq m net would be supported by sufficient turnover to make the store viable, even with main foodstore at the University and NIAB.
- It may be easier to develop the smaller shops in the Local Centres, as they would not be so dominated by a superstore. Also, a supermarket would have only a small proportion of comparison goods.
- Two supermarkets would claw-back some of the traffic that would travel further afield in the baseline option. As a result, CO_2 emissions reduce in the secondary catchment slightly more than with a superstore and increase in the primary catchment to a lesser extent than a superstore.
- Vehicle travel distance would reduce in the secondary catchment to a slightly less extent than with a superstore, whilst in the primary catchment there is a less marked increase with the two supermarkets performing better than a superstore.
- Two supermarkets would have minimal impact on the local highway network, compared to the baseline option of small supermarkets in the 3 Local Centres.
- Two stores would lead to two different foodstore operators, which would provide more choice, but the size of the store would have less range and variety of goods than the superstore.
- It would be possible to achieve a BREEAM ‘Excellent’ rating at this size of store.
- The 2,000 student units and 50% University key worker housing will lead to a population with significantly less car ownership than most communities and therefore accessibility of a main food store by sustainable means such as walking, cycling and public transport would be more necessary. A key policy objective contained within the AAP on the University site is ensuring that the 40% modal shift in journeys is achieved.
- The University’s employment generation will provide some further turnover and need for a larger store, at the colleges and 100,000 sq m of laboratory and research space. The West Cambridge development may generate some trips to the Local Centre.

6.9 The disadvantages of this option are:

- The supermarkets would not fully satisfy the qualitative need for main food shopping due to the size of the store and would have less range and variety of goods than a superstore. The supermarkets would not be able to fully compete with the existing main foodstores in the City. The supermarkets would be used more for top up shopping and it would be difficult to carry a weekly shop by cycling or walking. This will mean that some trips will still be made to existing superstores elsewhere in Cambridge and at Bar Hill, probably by car, in order to access the full grocery shopping offer, albeit less frequently.
- Within the primary catchment, CO_2 emissions and vehicle travel distance would increase due to the supermarkets attracting new traffic into NW Cambridge
- It is likely that the small shops in the local centre would still need to be service orientated uses even alongside the supermarkets.
- The second supermarket would need to be held back until the small supermarket at Orchard Park had been delivered.
- A decision would need to be made as to which supermarket could be delivered early.

Question 3: Do you support or object to Option B? Please provide reasons.

Option C – One superstore of 3,500 sq m net floorspace at the University Site, and the committed / pipeline floorspace at NIAB and Orchard Park.

6.10 The table below sets out the equivalent floorspaces (i.e. net convenience, net and gross) for this option, and shows the committed convenience development at Orchard Park and the pipeline convenience development at NIAB.

Floorspace (sq m)	**University**	**NIAB**	**Orchard Park**
Net convenience	2,500	1,170	623
Net	3,500	1,170	623
Gross	5,500	1,800	958

6.11 The size of the superstore proposed is most comparable to Tesco, Yarrow Road (usually referred to as Tesco, Fulbourn), which has a net convenience floorspace of 2,458 sq m (3,613 sq m). Other stores with a similar floorspace are Asda at the Beehive Centre and Waitrose at Trumpington.

Advantages and Disadvantages of Option C

6.12 The advantages of this option in terms of size of store are:

- The SRS concludes that this is the 'best fit' in terms of meeting the qualitative need for a main foodstore and the quantitative need for convenience retail floorspace i.e. at 2021 there is sufficient capacity to support a 2,500 sq m net convenience main foodstore in one larger Local Centre and smaller supermarkets (pipeline/committed development) in the other two Local Centres. However, this is assuming that one or both of the smaller supermarkets will have a lower sales density of around £5,000 sq m net, which is typical of budget retailers or independent stores and not the small format stores of the big retail operators (eg a Tesco Express or Sainsbury's Local). A supporting range of small convenience shops could also be supported in each centre, although it would be more challenging commercially to provide them alongside the superstore.
- It will meet the wider shopping needs of NW Cambridge, through the development of a larger local centre with a superstore. It will also meet the local shopping needs of each development site through the smaller scale supermarket provision (pipeline/committed).
- It is of an appropriate size to compete effectively with other main foodstores in the City and result in sustainability benefits by reducing the propensity for the existing and new population of NW Cambridge to travel elsewhere in the City or beyond to undertake main food shopping.
- The Transport Study showed that superstore is unlikely to have a significant impact on the local highway network, compared to the baseline option.
- It would be possible to achieve a BREEAM 'Excellent' rating at this size of store.

6.13 The disadvantages of this option in terms of size of store are:

- It would be more difficult to integrate a superstore into the design of the Local Centre, due to the block size and car parking requirements. However, a bespoke design solution based upon the design principles identified in this report would afford the best chance of achieving successful integration. Also the attraction of the superstore leading to additional trips would have an impact on the design of streets and junctions.
- Greater challenges in creating a viable local centre in terms of attracting other smaller shops
- The SRS advises that there is only capacity to accommodate 1,500 sq m net convenience floorspace before 2021, without impacting on the delivery of smaller stores in the other two centres and there would therefore be a need to phase its construction, which brings design challenges, including achieving sustainable form of construction.

- A superstore catering for weekly shopping trips is more likely to attract a greater proportion of trips by car. However, the local population could be encouraged to use more sustainable modes of travel such as cycling by encouraging schemes to hire out bike trailers. This is already being done successfully at the Waitrose store in Cambridge.

6.14 Advantages / Disadvantages of a Superstore on University Site:

- The 2,000 student units and 50% University key worker housing will lead to a population with significantly less car ownership than most communities and therefore accessibility of a main food store by sustainable means such as walking, cycling and public transport would be more necessary. A key policy objective contained within the AAP on the University site is ensuring that the 40% modal shift in journeys is achieved
- The University's employment provision will provide some further turnover and support for a larger store, with 100,000 sq m of employment and academic development. The West Cambridge development may generate some trips to the Local Centre.
- Geographically the store would be less accessible to Orchard Park, however residents here have fairly easy access to the Tesco store at Milton and other smaller stores and local centres in the area.
- A superstore would claw-back some of the traffic that would travel further afield in the baseline option. As a result, CO_2 emissions would reduce in the secondary catchment but to a lesser extent than with two supermarkets or a superstore on the NIAB site. In the primary catchment there would be greater increase in CO_2 than with two supermarkets but on a par with a superstore on the NIAB site.
- Vehicle travel distances would reduce within the secondary catchment to a similar but slightly greater extent than with two supermarkets, but notably less than with a superstore on the NIAB site. In the primary catchment there would be a greater increase than with two supermarkets but not as much as a superstore on the NIAB site.

Question 4: Do you support or object to Option C? Please provide reasons.

Option D –	One superstore of 3,500 sq m net floorspace at the NIAB Site, and the committed / pipeline floorspace at the University Site and Orchard Park.

6.15 The table below sets out the equivalent floorspaces (i.e. net convenience, net and gross) for this option and shows the committed convenience development at Orchard Park and the pipeline convenience development at the University site.

Floorspace (sq m)	University	NIAB	Orchard Park
Net convenience		2,500	623
Net	1,625	3,500	623
Gross	2,500	5,500	958

6.16 As described above, the size of the superstore proposed is most comparable to Tesco, Yarrow Road and similar to Asda, Beehive Centre and Waitrose, Trumpington.

Advantages and Disadvantages of Option D

6.17 The advantages and disadvantages relating to the size of store discussed under Option C apply equally to Option D, as the same sized superstore is proposed under this option. Therefore the differences between this Option and Option C are the site location.

6.18 Advantages / Disadvantages of a Superstore on NIAB Site:

- The SRS confirms that the centre at the NIAB site would serve the greatest total population within an easy walking and cycling distance. Therefore locating the superstore on the NIAB site provides the best location qualitatively to serve existing and new population as the central site between Orchard Park and the University and would be most likely to be able to attract shoppers from those centres.
- NIAB does not have the same level of employment generation and daytime uses as the University site.
- A superstore would claw-back some of the traffic that would travel further afield in the baseline option. As a result, CO_2 emissions would reduce in the secondary catchment to a slightly lesser extent than with two supermarkets but to a greater extent than a superstore on the University site. In the primary catchment there would be greater increase in CO_2 than with two supermarkets, on a par with a superstore at the University site.
- Vehicle travel distances would reduce within the secondary catchment to a notably greater extent than with two supermarkets or a superstore on the University site. However, in the primary catchment there would be a greater increase than with two supermarkets or a superstore on the University site.

Question 5: Do you support or object to Option D? Please provide reasons.

Additional Questions

Question 6: Do you think that there are any other issues to be considered, if so what are they and why should they be considered?

Question 7: Do you think that there are any other options that could be considered, if so what are they and why should they be considered?

Question 8: Where do you carry out your main food shopping at the moment and do you think that your shopping patterns would change as a result of any of the options? If so, how?

Question 9: Is there anything else you would like to comment on?

7. NEXT STEPS

7.1 Your views are being sought on any part of this Options Report and particularly in relation to the nine questions set out in the previous sections. The consultation period will run for a six-week period from Monday 6th September to 5pm on Monday 18th October 2010.

7.2 This Options Report and the supporting studies are available to view at the following locations:

- The Councils' Websites – www.cambridge.gov.uk and www.scambs.gov.uk/ldf
- Cambridge City Council's Customer Service Centre, Mandela House, St Andrew's Street, Cambridge.
- South Cambridgeshire District Council's Offices, South Cambridgeshire Hall, Cambourne Business Park, Cambourne.
- Cambridge Central Library, and libraries in proximity to the sites in NW Cambridge - Milton Road Library and Arbury Library.

7.3 If you have access to the internet, the best way to make comments is by using the on-line consultation system which can be found on Cambridge City Council's website (www.cambridge.gov.uk) with a link from SCDC's website. A guidance note is provided to help you use this system. This is the Councils' preferred method for receiving representations, as it helps to speed up the management of the process. However, if you do not have access to a computer, a paper response form can be completed and sent to the Councils. This can be obtained by contacting either Council as set out below.

7.4 There will be an exhibition about the Options Report at the North West Community Forum event, providing an opportunity to talk to staff and find out more. This will be held on 22nd September 2010 between 6pm and 9pm at Orchard Park Community Centre, Cambridge. In addition small un-staffed exhibitions will be available at Cambridge City Council's Customer Service Centre, South Cambridgeshire District Council's Offices in Cambourne, and Orchard Park Community Centre.

7.5 If you require any further information please contact either Council as follows:

Cambridge City Council

Telephone	01223 457000
Email	policysurveys@cambridge.gov.uk
Address	Mrs Sara Saunders Planning Policy Manager Cambridge City Council PO Box 700 Cambridge CB1 0JH

South Cambridgeshire District Council

Telephone	01954 713183
Email	ldf@scambs.gov.uk
Address	Mrs Caroline Hunt Local Development Framework Team Leader South Cambridgeshire District Council South Cambridgeshire Hall Cambourne Business Park Cambourne Cambridge CB23 6EA

GLOSSARY

Comparison shopping – comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.

Convenience shopping – convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionary.

District Centres - will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Gross floorspace – this is the total floor area within the retail building, including areas not accessible to the public such as staff rooms, storage areas etc

Local Centres - include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and laundrette.

Net convenience floorspace – this is the part of the sales area where food, drink, newspapers/magazines and non-durable household goods such as toiletries, cleaning products etc are sold.

Net floorspace – this is the area within the shop which is accessible to the public. It includes the part of the sales floor where convenience goods are sold and also where non-food items (comparison goods) are sold such as clothes, shoes, books, toys, large electrical appliances etc. It also includes checkouts, the area in front of checkouts, lobbies where goods are displayed (although different retailers vary as to whether they measure these areas), but does not include cafés or customer toilets.

Qualitative need – measured by the quality of something rather than its quantity. In retail terms this includes a need based on more subjective measures such as ensuring consumer choice and having an appropriate distribution of facilities by identifying ‘gaps’ or deficiencies in existing provision. Evidence of congestion and overcrowding is also a measure of qualitative need.

Quantitative need – measured by the quantity of something rather than its quality. In retail terms this is usually measured as the capacity for further spending, which is the balance between the amount of money spent in existing shops and the available amount of money in a given area. This capacity or ‘quantitative need’ can arise as a result of a forecast increase in spending by the population or through population growth. There could also be an imbalance between existing shops and the current level of expenditure available in an area.

Supermarkets - Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.

Superstores - Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.

APPENDIX 1

Foodstores in Cambridge and South Cambridgeshire

Store	**Net Convenience Floorspace (sq m)** (Cambridge Sub Regional Retail Study)	**Net Floorspace (sq m)** (Cambridge Sub Regional Retail Study)	**Gross Floorspace (sq m)** (IGD – 2009 all store database)
CAMBRIDGE			
City Centre			
Sainsbury's Sidney Street	1,260	1,326	2,640
Marks & Spencer, Sidney Street	1,112	1,171	
District / Local Centres			
Tesco Express, Cherry Hinton	245	245	593
Tesco Express, Campkin Road	191	191	274
Aldi, Histon Road	662	697	1022
Iceland, Histon Road	404	425	702
Co-op, Hills Road	206	217	307
Co-op, Histon Road	341	359	666
Budgens, Adkins Corner	488	514	650
Budgens, Arbury Road	750	789	1,279
Co-op Milton Road	132	139	195
Co-op, Mill Road	488	514	725
Out of Centre			
Tesco, Cheddars Lane	2,673	4,993	6,916
Asda, Beehive Centre	2,601	3,716	6,930
Sainsbury's, Coldhams Lane	2,986	4,265	6,653
Waitrose, Trumpington	2,678	2,976	4,578
SOUTH CAMBRIDGESHIRE			
Major Rural Centre Stores			
Morrisons, Cambourne	2,693	2,992	5,924
Budgens, Sawston	656	690	1,217
Spar, Sawston	357	376	578
Tesco Express, Histon	209	220	422
Co-op, Great Shelford	147	155	190
Co-op, Fulbourn	307	323	440
Out of Centre SCDC			
Tesco Extra, Bar Hill	4,031	9,392	15,215
Tesco, Milton	2,244	2,327	4,645
Tesco, Yarrow Road	2,458	3,613	5,574